## Overview:

This document explains how Students can add and manage their third-party access.

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

For assistance or training using these procedures, email the Office of the Registrar at registrar@findlay.edu.

Icons referred to in this document

⊕ Add Row   ≔ Prompt   ••• Related Actions   ✱ Required Field   ○ Radio Button

Designate Friend/Family as Third-Party User

This task allows students to designate a "Friend or Family" contact as a Third-Party User. An individual can be added as a Third-Party User at any point in time.

1. Click the **Profile** picture in the top left corner of Workday.

2. Click **View Profile**.
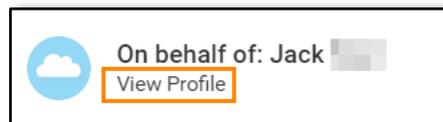
3. Click the **Contact** in the blue vertical banner on the left-hand side of the page.
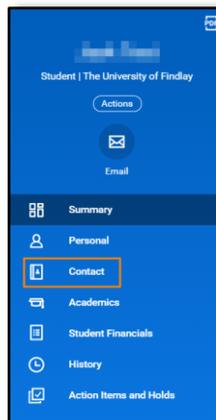
4. Click **Family and Friends**.
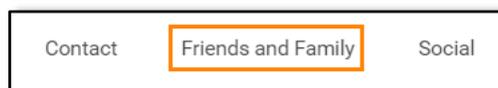
5. Click **Actions**, in the far-right column.

6. Click **Edit Friends and Family**.
   Note: Review the Third-Party column to confirm the individual is not already a Third-Party User.
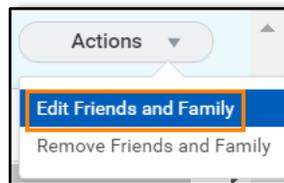
7. Click the **Is Third Party User** check box.
   Note: You will still need to assign Third-Party Permissions *(see below task).*

8. Click **OK**.
9. Click **Done**.
   Note: The contact will now display as a Third-Party User.

Manage Third-Party Access

1. Follow steps 1-5 above.
2. Click **Manage Permissions for My Third Party**.

OH	Yes	Actions ▼

Edit Friends and Family
Manage Permissions for My Third Party
Remove Friends and Family
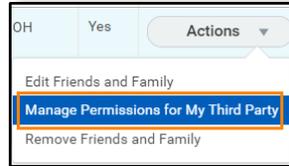
3. The **Third Party** and **Institution** information auto-populates.

Third Party * ✕ Joy Test ⋯
Institution * ✕ The University of Findlay
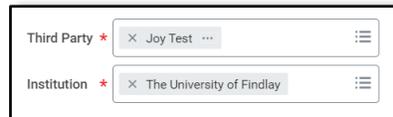
4. Click **OK**.
5. Review the **Tasks Available for Third Party User**.
6. Click the checkbox to select which tasks are **Allowed** for this user.
   Note: You do not have to grant access to all the tasks.

Task Name   Make a Payment
Description   This task gives access to make a payment on the student's behalf.
Allowed ☐

Task Name   View Financial Aid Package
Description   This task gives access to view the financial aid details on the student's behalf, including details around what financial aid is offered and what the estimated costs are for the year.
Allowed ☑

Task Name   View Account Activity
Description   This task gives access to view student account transactions, including charges, payments, financial aid, and refunds, that have been posted to the student account. Details around the Due Now amount and any available payment plans can also be seen.
Allowed ☑

7. Click **OK**.
8. Review the FERPA Release Authorization Waiver.
9. Enter a comment to support the access granted in the **Purpose of Waiver** field.

FERPA Release Authorization Waiver

Students have the ability to grant access to certain aspects of their student record – including financial and academic information and tasks – to third-parties such as parents or other family members.

Jack Test is allowing Joy Test to have access to the following tasks:

View Account Activity
View Current Classes
View Financial Aid Package
View Student Grades
View Student Statement (With Courses)

Purpose of Waiver *   Format ⌄ | **B** *I* U̲ A̲ ⌄ | ☰ 🔗

10. Click the check box to **Confirm**.

I consent to grant this access.

Confirm * ☐
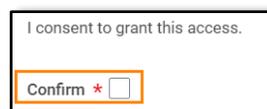
11. Click **Submit**.
    Note: The Third-Party User will now have access to the tasks selected. If this is the first time you are granting this third-party access to your record, they will receive emails giving them Workday login information and explaining how to login.